

The screenshot shows the LeadRouter Agent Today Page interface. At the top, there is a navigation bar with tabs for Today, Leads, Setup, and Help. Below this is a calendar view and a list of leads needing attention. On the right side, there are sections for New Messages, Support, and Notification. Red circles with numbers 1 through 7 are overlaid on the interface to highlight specific features.

1. Today (Navigation Bar)

2. New Messages (Messages Section)

3. Support (Support Section)

4. Notification (Notification Section)

5. Calendar (Calendar View)

6. List of My Leads Needing Attention (Leads Table)

7. Help (Navigation Bar)

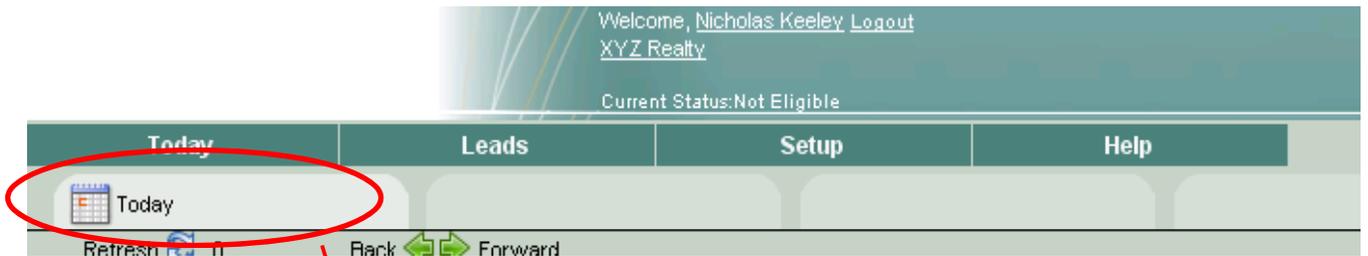
Last	Last Action	Last Comments	Action Needed	Email
Heather Walter Williams	Active-Appointment	test	Update Lead	
John Smith	Active-New Lead		Update Lead	
Karen Coffey	Active-New Lead		Update Lead	
Michael Whitford	Active-New Lead		Update Lead	

To access LeadRouter, enter through your company's intranet site and locate the menu or hyperlink to the LeadRouter System.

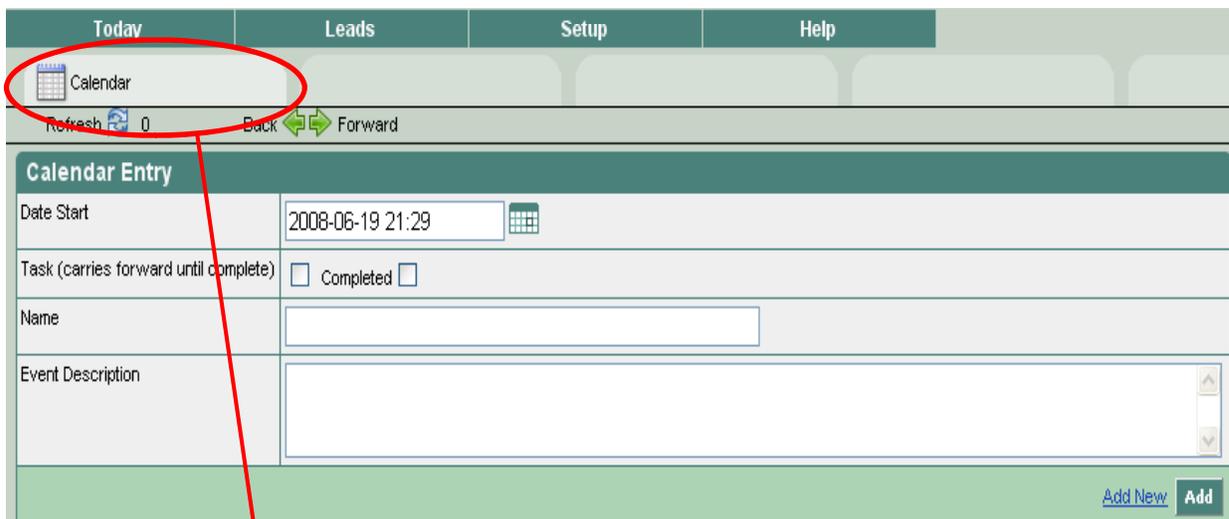
1. LeadRouter's **Today** page provides access to all features in the *navigation bar* across the top.
2. The **New Messages** section will contain system status messages, user notification changes, company specific messages, new user functionality along with links to both online help, and company.
3. **Support**: Helpdesk contact information and hours of operation.
4. The **Notification Tool** lets you tell LeadRouter where to call you with new leads. Your primary number is usually your cell phone and can only be changed by your Company Administrator. Enter an alternate number under **My Profile** if desired.

The **In/Out** board lets users tell LeadRouter if they are available or will be out for a short/long period of time. Users in the "Out" status will not receive lead calls during this period.

5. The **Calendar** tool displays **Next Date/Next Action items** assigned to leads. Add items to the calendar such as meeting or appointment dates. Any lead due for an update will also show up on the calendar.
6. The **List of My Leads Needing Attention** displays leads that are **out of compliance** (red-lights). Users can update red leads directly from the *Today Page*.
7. **Work Areas** allows you to have multiple features open simultaneously e.g. *My Profile, Lead Table, etc.* To open a new Work Area, click in a blank tab located below the Tool Bar and select feature.



Multiple work areas allow users to run different functions simultaneously e.g. Today Page, Leads Table, My Profile by clicking the work area and selecting the function from the dropdown menu in the toolbar.



LeadRouter's calendar feature will display items Needing Attention if designated by agent when updating a lead. To enter appointments and events, click the Today tab.

Agent Setup: My Profile

The screenshot shows a web application interface for 'My Profile' setup. At the top, there are tabs for 'Today', 'Leads', and 'Setup', with 'Setup' highlighted by a red box. Below the tabs, there are navigation buttons: 'Refresh', 'Back', and 'Forward'. The main content area is titled 'MyProfile' and contains several sections:

- Contacts:** A table with columns for 'Cell', 'Cell2', and a text input field. The 'Cell' field contains '8432377092' and the 'Cell2' field contains '8432377092'.
- Phone Choice:** Radio buttons for 'Cell' and 'Cell2'.
- Normal Email:** Text input field containing 'dev@batworx.com'.
- Mobile Email:** Text input field containing 'dev@batworx.com'.
- Lead Response Hours:** A table with columns for 'Mon In', 'Mon Out', 'Tue In', 'Tue Out', 'Wed In', 'Wed Out', 'Thu In', 'Thu Out', 'Fri In', 'Fri Out', 'Sat In', 'Sat Out', 'Sun In', and 'Sun Out'. Each cell contains a time value and a dropdown arrow.
- User Defined Flags:** A table with columns for 'Udf1' and 'Udf2'. 'Udf1' contains 'Monthly Mailer' and 'Udf2' contains 'Buyer Seminar'.
- User Preferences:** A table with columns for 'Locale (requires re-login)' and a dropdown menu containing 'English - USA'.

A 'Submit' button is located at the bottom right of the form.

Primary Cell: Phone number LeadRouter calls with new leads; Can only be changed by your Administrator.

Alternate Cell (Cell2): A second phone number users can “switch to” manually (example: direct line at their desk); Use in combination with *Notification* area on Home page.

Regular Email: The address where LeadRouter automatically sends a copy of accepted leads; can only be changed by your Administrator.

Mobile Email: Receive “second” copies of accepted leads or notification of compliance.

Lead Response Hours: Set daily hours for personal “availability” to receive leads from the system. Your personal hours must be *within* the company’s default hours of operation.

User Defined Flags: Users may create two “user defined flags” to use as personal tracking groups for leads. These flags will appear on Lead detail screens and can be used to filter leads by groups in searches.

User Preferences: Language option.

My LeadRouter Profile: Access your personal skills profile which LeadRouter uses to cross-match qualified leads.

My LeadRouter Mobile Profile: Select mobile device and provider to access LeadRouter.

Agent: Setup Page - My LeadRouter Mobile Profile

Welcome, [Flora Davenport](#) [logout](#)
XYZ Realty2

Current Status: Not Eligible

Today	Leads	Setup	Help
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My Profile 1

Refresh 0 Back Forward

[Back to MyProfile](#)

Add/Edit My Mobile Profile

Cell

Pin 2

Device 3

Carrier 4

Set up your LeadRouter Mobile Profile to access LeadRouter from your Mobile Device (Blackberry, Trio, PDA, etc.) Using Mobile Device gives agents access to LeadRouter to update leads and stay in compliance!

Set up Instructions for LeadRouter Mobile

1. Click on the “My Mobile LeadRouter Profile” link (you will be directed to your “My Mobile Detail”)
2. Select a 4 digit PIN Number (e.g. 1234 or last 4 digits of cell phone number.)
3. Enter Device Make and Model (e.g. Blackberry 8703e)
4. Enter Carrier (e.g. Verizon) then click Submit.

Login Instructions for Accessing LeadRouter Mobile

- Open a web/internet browser on your mobile device (Refer to your user manual for your mobile device on accessing web/internet browser.)
- Enter the following URL in the address bar: <http://mobile.nrtinc.com> (you will be directed to the LeadRouter Mobile Login Screen)
- Enter your User ID and Password. The User ID and Password are the same as those you use to access the NRT Extranet from your computer. Click the [Log In] button.

Welcome, Nicholas Keeley Logout
XYZ Realty
Current Status: Not Eligible

Today	Leads	Setup	Help								
My Leads											
Refresh 0	Back	Forward	Close								
Add New Contact											
List of Active Leads											
Total Records: 10											
Followup	Lead#	Name	Results	Hot	Co.	Multiple Inquiry	Lastdate	Last Action	Nextdate	Nextaction	Send An Email
	6/18/2008	4403559	Powers		<input type="checkbox"/>	✓	-	6/18/2008			
	6/20/2008	4404770	Dean		<input type="checkbox"/>	✓	-	6/19/2008			
	3/17/2008	4317220	Hollingsford III		<input type="checkbox"/>	✓	-	3/13/2008			robert@matthewferrara.com
	3/20/2008	4323723	Hannaford		<input type="checkbox"/>	✓	-	3/20/2008			
List of Incubating Leads											
Total Records: 2											
Followup	Lead#	Name	Results	Hot	Co.	Multiple Inquiry	Lastdate	Last Action	Nextdate	Nextaction	Send An Email
	7/18/2008	4317214	Homebuyer		<input checked="" type="checkbox"/>	✓	-	3/13/2008			mary@matthewferrara.com
List of Closed Leads											
Total Records: 2											
Lead#	Name	Results	Hot	Co.	Multiple Inquiry	Lastdate	Last Action	Nextdate	Nextaction	Send An Email	
3868732	Washington	Closed		✓	-	12/10/2007				leads_3868732@bootstrap.biz	
4317217	O'Donnell	Closed	✓	✓	-	5/29/2008		4/1/2008	Call Barbara after noon	barbara@matthewferrara.com	

Click *Leads* and select *My Leads* from the drop down to display your leads table where you can monitor and update leads at any time. Leads are separated into three tables: Active leads, Incubating Leads and Closed (sold) leads. Closed leads will remain in your table indefinitely and can be searched in the future.

The lead table displays:

Lead # - automatically assigned.

Name: click the name to see lead details and update the lead.

Results: the current status of the lead within a table (sub-status).

Hot column: users can click check box for visual reminders to particular "hot" leads.

Co: indicates if the lead was company generated or agent-entered manually.

Multiple Inquiry: for inquiries who have sent in more than one email inquiry to the agent.

Last Date/Action: Quick view of your last action for a lead.

Next Date/Action: Quick view of the date of your next planned action for a lead.

Send an Email: Click email address to send message to the contact.

Agent: Leads: Lead Status Lights

All leads have a “Lead Status Light” that quickly displays their compliance with company reporting rules.



RED lights mean the lead is **out of compliance** with the company reporting rules; the time for updating that lead has passed. **If you have any red (out of compliance leads) your account will become “ineligible” for new leads until all existing leads are updated and brought into compliance with the reporting requirements.**



YELLOW lights mean the lead is **within 24 hours of a required reporting date**. You should take action now to update the lead before it falls out of compliance (red).



GREEN lights mean the lead is in compliance with required updates and reporting rules. Look at the *Follow Up* column to see its next required reporting deadline.

List of Active Leads										
Total Records: 10										
Followup	Lead#	Name	Results		Co.		Lastdate	Last Action	Nextdate	Nextaction
	6/18/2008	4403559	Powers	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	6/18/2008			



To display the Full View of a Lead, click the Name in the Leads table. Lead details are displayed from the original inquiry. Agents can add or update information, check off *Attributes* for the lead (useful for searches later) and update the lead by entering *New Action* items.

Agent: Leads: Detailed View & Updating

List of Active Leads							
Total Records: 10							
Followup	Lead#	Name	Results		Co.		Lastdate
	6/18/2008	4403559 Powers		<input type="checkbox"/>		-	6/18/2008
	6/20/2008	4404770 Dean		<input type="checkbox"/>		-	6/19/2008
	3/17/2008	4317220 Hollingsford III		<input type="checkbox"/>		-	3/13/2008

To update lead click client name

Update Window Opens

- 1) Click the **ACTION** list to select a category most similar to the action taken for the new lead.
- 2) Enter **COMMENTS** in the space provided (up to 255 characters)
- 3) **SUBMIT** to store your comments.

Today	Leads	Setup	Help
Today	My Leads		
Refresh 0	Back Forward		Close

Record Id	Last	Results		Co.		Lastdate	Last Action	Nextdate	Nextaction	Send An Email
	4403559	Powers	<input type="checkbox"/>	-		6/18/2008				

1 Action

Select Value

Report #: 1 due_by Wednesday, June 18, 2008

3

2 Record comments (up to 255 characters)

Note: Agents must update leads on or before the deadlines set by their broker's reporting interval requirements or the lead will fall out of compliance (not eligible) and halt the system from sending them additional NEW leads.

If an agent has one or more leads "out of compliance" they must update all of them using the ACTION function. LeadRouter will then automatically return the agent's account to an "AVAILABLE" status for new leads.

Agent: Leads: Lead Action Explanations

Active- Agency Agreement: use this selection to indicate you have signed an agency agreement. Write details in comments. *Maintains Active Status.*

Active - Appointment: use to indicate appointments made/kept with consumer. Write comments in details. *Maintains Active Status.*

Active - Attempted Contact: use to indicate any kind of “attempted contact with consumer” such as leaving a message, sending follow up email, etc. Write details in comments area. *Maintains Active Status.*

Active - Customer Contact: use to indicate any kind of “successfully contacted consumer” activity such as spoke on telephone, met at office. Write details in comments area. *Maintains Active Status.*

Active – Sales Contract: use to indicate you have entered into a purchase/sales contract with this consumer.

Bogus Lead – Bad Contact Info: use to indicate you received a lead with erroneous contact data, such as “Mickey Mouse” and there is no way to contact the consumer; **Do not use to indicate you felt the lead you got was bad/unfair.** Transfers lead to Administrator.

Closed Transaction: use to indicate the consumer has **completed a purchase/sale transaction.** Write details in comments. *Transfers contact to Closed Status.*

Incubating by Maintaining Contact: use to indicate you are maintaining regular contact with consumer. Write details in comments. *Transfers contact to Incubating Table and maintains follow up requirements.*

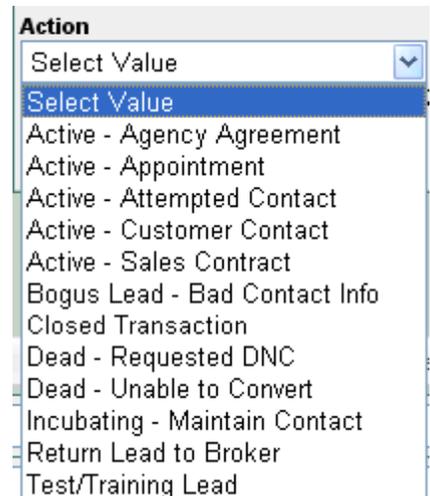
Dead – Requested DNC: use to indicate you contacted the consumer and they requested to be added to your company’s Do Not Call list and not contacted further.

Dead Lead: use to indicate you cannot convert lead into business; **Do not use to indicate you could not contact the consumer (use Active – Attempted Contact).** Transfers lead to Administrator who will “certify” the lead is dead or send back to agent for further attempt. Removed from agent table permanently.

Reassign Direct to Other User: *Not available in all companies; enables certain users (Administrators) to directly transfer a lead to another user. Frequently used by company staff.*

Return Lead to Broker: use to return a lead to the Broker or Administrator if you are not able to assist the consumer. Example: Consumer requires expertise for which you are not qualified.

Test/Training Lead: use to clear a lead you were “practicing” with in order to get familiar with the system, or used when demonstrating LeadRouter to a prospect and generating a lead for yourself.



List of Potential “Actions”

Agent: Leads: Lead History & Contact Information

Contact Information		History	Original Lead	Lead Emails	DNC Sentry
Name(s)	Salutation	First(s)	Austin	Last	Powers
Address	Line 2	City	State	Zip	
Email					
Phone(s)	2342342342	Select Value		Select Value	
Timeframe	Select Value				
Source	New Test				
Attributes	<input type="checkbox"/> Buyer <input type="checkbox"/> Seller <input type="checkbox"/> Renter <input type="checkbox"/> Loan <input type="checkbox"/> Hotflag <input type="checkbox"/> Past Client <input type="checkbox"/> Fsbo <input type="checkbox"/> Newsletter <input type="checkbox"/> Farm Area <input type="checkbox"/> Udf1 <input type="checkbox"/> Udf2				
Nextdate	<input type="text"/> <input type="text"/>				
					Submit

Lead Information: All contact information, updates and original consumer email are stored here.

Contact Information – View client contact information captured by LeadRouter. Add additional contact info e.g. address and phone number to centralize. Agents can also assign *Attributes* to lead (buyer, seller, etc),. Click *SUBMIT* if adding or editing contact information.

History Tab – Stores all Agent updates and shows a history of comments..

Original Email – Displays original client email from the web.

Lead Email – Displays additional emails related to this lead.

DNC Sentry – If your company subscribes to the DNC Sentry, LeadRouter will display the status of the customer phone number with respect to Do Not Call database.

Agent: Leads: Add a Manual Lead



Agents can enter their own personal leads in LeadRouter to make it easy to track all prospects – from all sources – in one system. Fill in the blanks of the Contact Detail screen.

1. Click Leads Tab
2. Click Add New Contact
3. Fill in the information
4. Add to save

The screenshot shows the 'Contact Detail' form. At the top, it says 'Welcome, Flora Davenport logout XYZ Realty2' and 'Current Status: Not Eligible'. The navigation bar includes 'Today', 'Leads', 'Setup', and 'Help'. Below the navigation bar, there is a 'Leads' section with a 'Refresh' button and a count of '0'. Below that, there are 'Back' and 'Forward' navigation buttons. The form has several tabs: 'Contact Information', 'History', 'Original Lead', 'Lead Emails', and 'DNC Sentry'. The 'Contact Information' tab is active. The form fields include: Name(s) (Salutation, First(s), Last), Address (Line 1, Line 2, City, State, Zip), Email, Phone(s) (with dropdown menus for area codes), Timeframe (with a dropdown menu), Source (with a dropdown menu), Attributes (Buyer, Seller, Renter, Loan, Hotflag, Past Client, Fsbo, Newsletter, Farm Area, Udf1, Udf2), and NextDate (with a calendar icon). The 'Add' button is circled in red.

TIPS:

- Be sure to assign every manually entered lead to a source, so you can track where your offline leads are coming from, which advertising tools are effective and compare offline-to-online lead sources.
- Check off one or more lead *Attributes* to make it easier to search for your leads in groups later, especially to do follow ups or send emails.
- Treat offline leads with the same follow up importance as online leads; use the Action tool and comments to create a useful history for every action taken with an offline lead.

Accountability: Agent Lead Follow-up Reporting Times

Three different reporting time periods are set in LeadRouter:

- | | |
|--|---|
| 1. The amount of time, in hours, after accepting a lead and the first required follow up entry in the LeadRouter system. | First report interval
4 hours |
| 2. The amount of time, in days, between the first follow up and the second follow up entry in the LeadRouter system. | Second report interval
7 days |
| 3. The amount of time, in days, between each subsequent follow up entry in the LeadRouter system. | Recurring interval
30 days |

Call Handling: Voice Mail Claim Time (Listing Leads)

LeadRouter is setup to leave a voice mail with a **15 minute** “claim time” if you don’t answer your phone right away.

LeadRouter will leave a voicemail message along with a callback number and PIN for you to retrieve the lead **within that 15 minute time period.**